



# FINDING AND MERGING DUPLICATES IN FAMILY TREE

PLAN of ACTION – USING the SIMPLE SANDBOX, IDENTIFY and MERGE DUPLICATES for FOUR MEMBERS of ROBERT and ANN's FAMILY

Before merging any individuals, research should be done to identify the correct name, event dates and places of your ancestor. In FS Family Tree you should search for duplicates using both "Possible Duplicates" and the "FIND" features. In this Instructor Materials - Simple Sandbox exercise ONLY "Possible Duplicates" will be used.

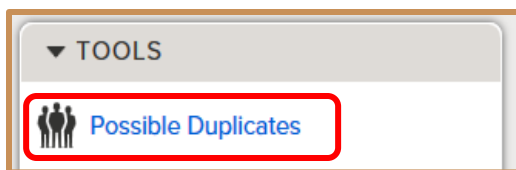
## HOW TO GET TO INSTRUCTOR MATERIALS – SIMPLE SANDBOX<sup>†</sup>

Path: familysearch.org > Get Help > Learning Center > Family Tree Training Lessons and Videos > View This Lesson > Instructor Materials - Simple Sandbox  > 1.Simple Sandbox First Account. Wait several minutes for account to be made. See the red box in the upper left corner.  This box shows you that you are safely in the sandbox. (If you are returning to work in this sandbox, click on "3. Simple Sandbox - Reset Your Account", otherwise the program may bring up the wrong sandbox.)

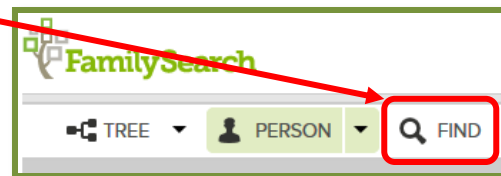
- Each account in the Simple Sandbox contains the same FIRST NAMES. There is always a Robert, Rachel, Ann, Alison, Henry, Nancy, etc. however, the LAST NAMES, EVENT DATES and PLACES will be different.
- Robert and Rachel will load up first. Select Robert's wife Ann to see their family including their second child Henry.

## FINDING DUPLICATES

In the Simple Sandbox and in FS Family Tree, there are two ways to find duplicates from a person's Details page: using the **Possible Duplicates** and the "FIND" features.



(bottom right)

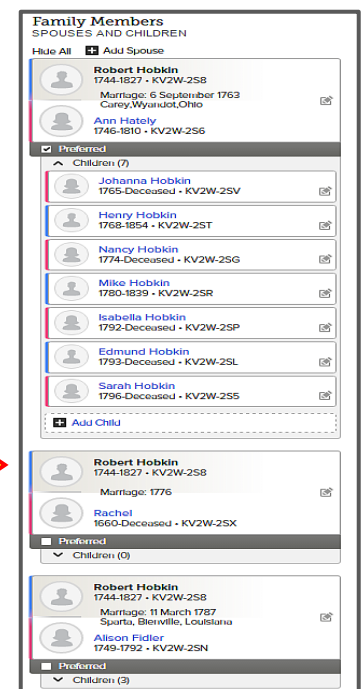


(top left)

During this exercise only Possible Duplicates will be used. \*To see more information on using the FIND feature, turn to the last page of this handout.

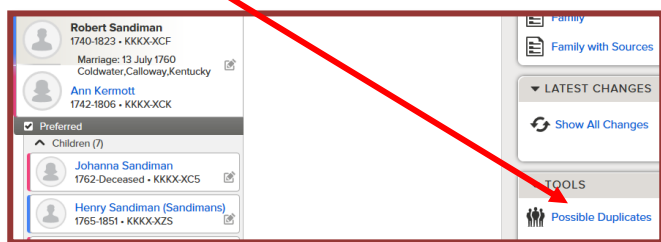
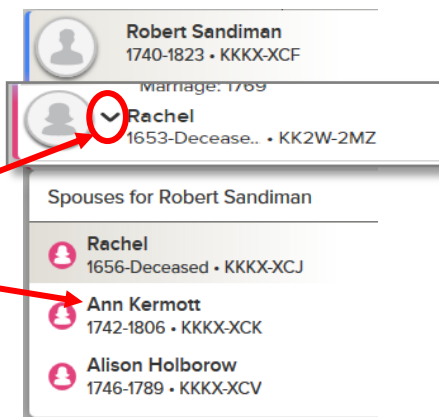
With the **Possible Duplicates** feature it is not uncommon for NO MATCHES to appear following a search. The "duplicate" criteria are extremely difficult to meet. Therefore, if there are **NO Possible Duplicates** (or even when there are some matches), use the \***FIND** feature to search for other possible matches.

Before performing any merges, **highlight**, copy, and then paste the family with their ID #s into a Word document OR screen capture the Family Members section and print or save it. This will help you if you need the names and ID numbers later.

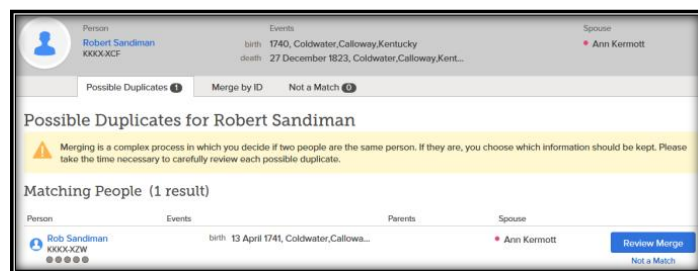


## I. ROBERT'S MERGE

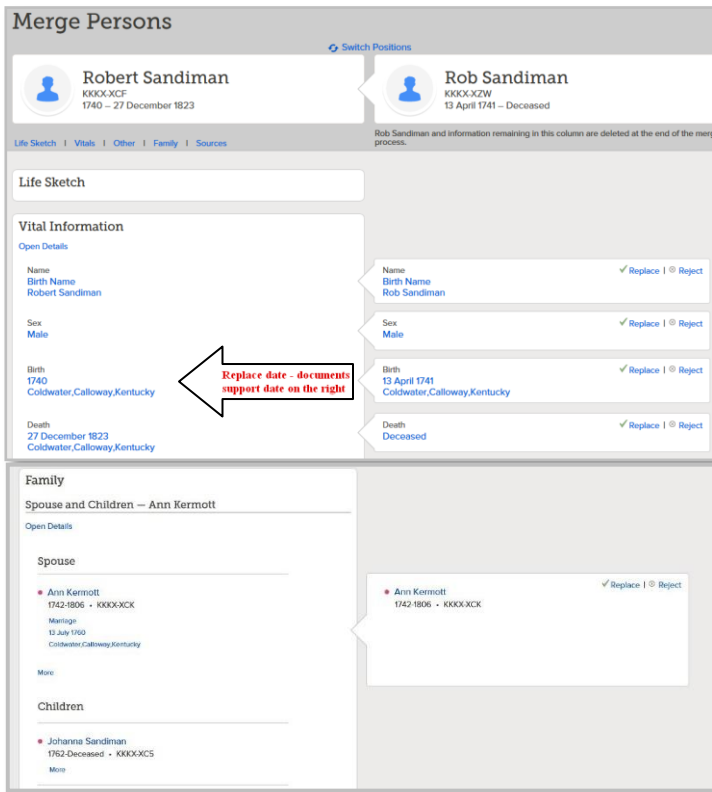
1. After *Signing in* to the Simple Sandbox, **Robert** and **Rachel** appear first in the Pedigree view. However, we will be working on **Robert and Ann's** family.
2. To find wife **Ann**, reveal all of **Robert's** wives by clicking on the down arrow by **Rachel's** name. Then click on **Ann** to show her family.
3. Start finding duplicates and merging for the father **Robert**. Click on
  - a) his name in the pedigree
  - b) "Person" in Summary card and
  - c) **Possible Duplicates** in his Details page. (Scroll down to Tools on right.)



4. One or more matches may appear for **Robert**. In this sandbox, duplicates have the same last name. Click on Review Merge button [Review Merge](#).



5. A **Merge Persons** window opens where you can compare **Robert's** documented information with that of the possible match... in this case **Rob**.



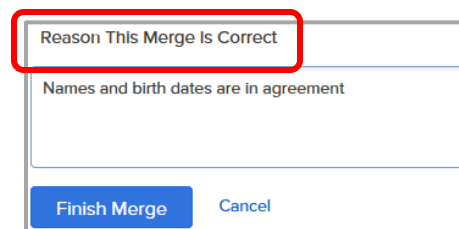
6. Having determined that Rob and Robert are the same person, click **Add** or **Replace** to move the correct information from Rob on the right to Robert on the left.

**Replace** means information on the right takes the place of information on the left.

**Add** means new information on the right is moved to the left.

7. Scroll down through all the information in the **Merge Persons** window. You will notice that both Anns have identical ID numbers (KKPK-L2P), they are the same person and there is no need to click **Replace**.
8. When you have finished all **Add** and **Replace** steps, click the [Continue Merge](#) button at the bottom of the page.

8. Give a specific "Reason This Merge Is Correct" explaining why these two people are the same. Then click **Finish Merge**. You will be returned to **Robert and Ann's** Family Member section.



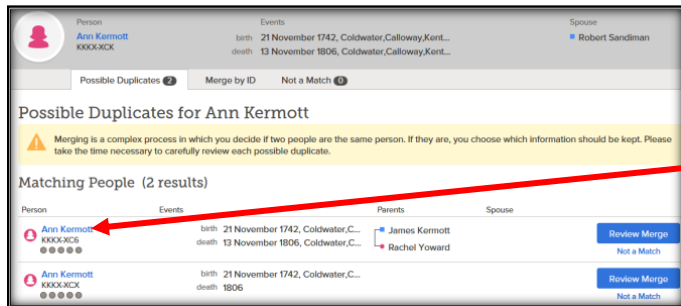
Note: If an error is made transferring information, it can be corrected by clicking “Undo” in the box.



## II. ANN'S MERGES

You will notice that merges frequently repeat the same steps.

1. To find duplicates for **Ann**, click on her name from Robert's page. In the Summary card, click on her name again. Then in her Details page, click on **Possible Duplicates**.

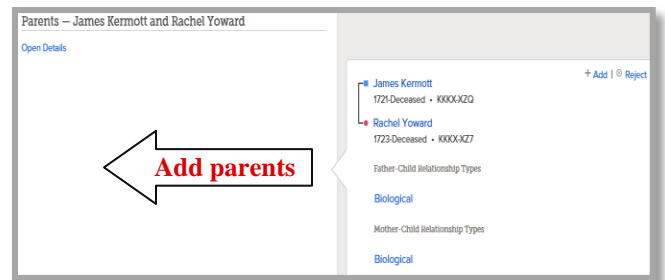


2. One or more possible matches may appear. To decide which individuals to merge, consult your research findings. For this exercise, click on the **Review Merge** button of the first Ann because our research shows she is a duplicate.

4. To complete the merge of the first Ann
  - a) click *Continue Merge*
  - b) give a “Reason This Merge is Correct”
  - c) click *Finish Merge*

5. You will be taken back to Ann's Details page. Click **Possible Duplicates** again.

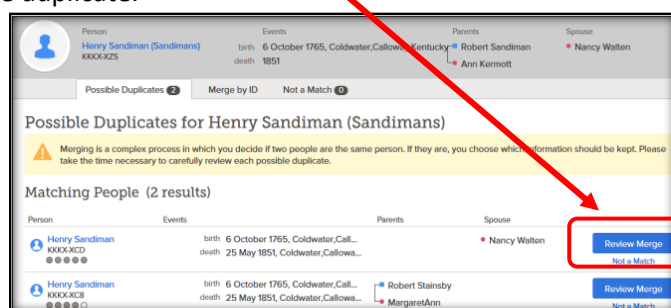
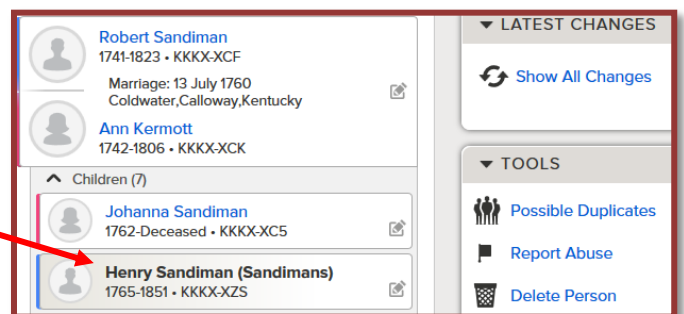
6. There is another Ann with the same last name; click on her **Review Merge** button. In this merge all the information is the same, so there is no information to bring over. However, the two Anns still need to be merged. Merge them.



## III. HENRY'S MERGES

Now that both parents have been merged, look at their children. In this exercise we will only merge son **Henry**.

1. Perform the merges for **Henry**, the second son of **Robert** and **Ann**. Click on
  - a) his name in the Family Member section
  - b) “Person” in his Summary card and
  - c) **Possible Duplicates** in his Details page
2. Two matching **Henrys** will appear. Click *Review Merge* for the first possible duplicate.



3. Follow the previously outlined steps to complete Henry's merge. Use the illustration below as a guide.

Primary Person
Possible Duplicate

Each arrow indicates a change that is to be made when merging the first possible Henry match.

**Whenever there is an option to ADD a person, always move that person to the left.** Even if the same name is found on the left, the IDs will be different.

In this case, **Nancy (KKKX-XCN)** needs to be moved to the left. After merging **Henry**, she will appear on his Details page as another spouse. If she is identified as a duplicate, she can then be merged with **Nancy (KKKX-XZ4)**.

Whenever there is information on the right that differs from that on the left, research is necessary to determine what is actually correct **before any merging is done**. To exit merging, click **Cancel**. In this sandbox we assumed that all selected/moved information was verified through research.

4. You will be taken back to Henry's Details page. Click **Possible Duplicates** again. Click *Review Merge* for the second Henry.

5. The second Henry's merge is an example of "Not a Match" because the **parents are different**. You can click "*Not a Match*" in two places: on the **Possible Duplicates** page (lower right) or at the bottom of the **Merge Persons** page.

Note: This is "Not a Match" even though both Henrys have the same dates and places. (In the Simple Sandbox the dates and places could not be changed!) It is "Not a Match" because the parents are different.

6. When "*Not a Match*" is selected, a final comparison of the two Henrys can be made in the **Not a Match** window, a reason statement entered, and **Not a Match** selected.

7. Selecting "Not a Match" takes you back to the Possible Duplicate Window. Click "Go to: Henry..." to go to his Details page.

#### IV. NANCY'S MERGES

1. In Nancy's merge, we will learn how to "**Merge by ID**" and how to **Switch Positions** of the persons to be merged. In Family Member section, **highlight** and copy the ID number of Henry's second spouse Nancy.

2. Then, go up and click on the first Nancy's name (the Nancy with children), click on "Person" in her Summary card, and select **Possible Duplicates** in her Details page.
3. Select the "**Merge by ID**" tab and paste the second Nancy's copied ID. Click *Continue*.

4. Usually the person with the most correct information is placed in the Primary position on the left. (In this case, we will not follow this rule so that you can practice switching positions and bringing over more information.) Click **Switch Positions** at top of **Merge Persons** page.

5. Scroll down the page and **Add** or **Replace** correct information and relationships. In the Spouse section, notice that both Henry's have the same ID, but the Henry on the right has the more correct information. Click **Replace**. Remember to **Add** the children.

6. To complete Nancy's merge and finish this handout, click *Continue Merge*, give a Reason Statement, and click *Finish Merge*.



## \*FINDING DUPLICATES USING THE “FIND” FEATURE

The benefit of using the “**FIND**” feature in FS Family Tree is to see more possible duplicates. (It does not work well in the Simple Sandbox database.) **In Family Tree always use FIND when you get a “No results found” response to your search in Possible Duplicates.** Even when duplicates are found, click **FIND** to get a more complete list of possible matches. In the window that opens enter the information for the person whose duplicates you seek.

Results using  
**Possible  
Duplicates**

More results  
using **FIND**  
feature

Name	Events	Relationships
These results strongly match your search terms. 14 of 1 results		
Luther Spring LZX6-FV9 ●●●●●	birth: 20 December 1812, Northbridge, Worcester, Massachusetts, United States death: 14 April 1885 burial: 1885, Uxbridge, Worcester, Massachusetts, United States of America	spouse: Abigail Wood LZX6-B1G father: Adolphus Spring LZX6-BGQ mother: Lydia Taft K2FT-6WT
The following results do not strongly match what you searched for, but they may help. 1-24 of 2499 results		
Luther Spring KHRV-4U ●●●●○	birth: 12 October 1787, Uxbridge, Worcester, Massachusetts, United States death: 19 June 1862, Worcester, Worcester, Massachusetts, United States	spouse: Nancy Whitney Read MFLK-WF7 father: Edwin Spring K2SM-7DQ mother: Eunice Taft K8KB-XOR
William Luther Spring 97EP-QOL ●●●●○	birth: 25 October 1832, Uxbridge, Worcester, Massachusetts, United States death: 1874	father: Luther Spring K8RV-4U mother: Nancy Whitney Read MFLK-WF7
Luther Spring K2BF-WQZ ●●●●○	birth: 1809, Windham, Windham, Vermont, United States	spouse: Mary Gould K8BC-BKS
Luther Spring 93KC-3SH ●●●●○		spouse: Maria Pecke 93KC-3ST

Search pages of the results carefully. At times the information (name, date, place) may differ from what you expect, especially if the submitted information came from a marriage record, as opposed to a birth or christening record. Click on **name of person** you think is a possible match and perform the necessary merge steps.



## † Use of Instructor Materials – SIMPLE SANDBOX

- The **Instructor Materials - Simple Sandbox** is a fake database featuring **Robert** and **Ann**, members of their family, and other individuals. This database contains duplicates that need to be merged. All of this is intended to provide a safe place to practice more complicated tasks in Family Tree, such as finding and merging duplicates and fixing incorrect relationships.
- To avoid difficulty with the sandbox, **no more than five persons should sign-in to make an account at one time.**
- The first time you go into the Simple Sandbox ([Instructor Materials](#)), click on **Simple Sandbox First Account**. You will be asked to sign-in with your Family Tree username and password. Wait a few minutes for your account to be generated. **Do NOT click the Sign In button more than ONCE!**

Teacher Helps					
Simple Sandbox For Short Quick Experience					
1. Click on the link to Obtain First Sandbox Account	New	1. Simple Sandbox First Account	2 minutes to create an account	13 Jun 2015	
2. Click on the link to Return to Your Sandbox Account	New	2. Simple Sandbox Return to Your Account		13 Jun 2015	
3. Click on the link to Reset Your Sandbox Account	New	3. Simple Sandbox Reset Your Account	2 minutes to reset an account	13 Jun 2015	
4. Problems Logging in or Resetting Account		5. Send e-mail to Support	Please include user name	13 Jun 2015	

- Every time after the first visit, click on **Simple Sandbox Reset Your Account**. You will be given a new fake database. The **given names** that appear in each family are the same as before (**Robert, Ann, Rachel**, etc.). But the **surnames, dates and places are different.**
- Activities done in the Simple Sandbox can be repeated. They **never** affect your ancestors' information in FT.
- Before any changes are made in the Sandbox, it is assumed that the information for Robert and Ann's family have been established through careful research.

**Note: When selecting and merging duplicates in the real Family Tree database, thorough research should always precede and determine what changes are made to your families.**

cgm/dsc 4/15/2016